



LISTED PLACES OF WORSHIP  
**ROOF REPAIR FUND**

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# **Listed Places of Worship: Roof Repair Fund – Receiving a Grant**

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If you require a copy of this guidance in an alternative format (large print, Braille or audio version), or if your first language is not English, we can provide it in the appropriate format or language if you ask us. It is also available in Welsh.

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### 1 Introduction

This document will help you to request payment from the National Heritage Memorial Fund (NHMF) and report on the progress of your project. We are committed to being flexible in our approach, working responsively, proactively and collaboratively as circumstances require. Your grants officer will be your main contact during the delivery of your project.

You must comply with the NHMF Listed Places of Worship: Roof Repair Fund standard terms of grant and additional requirements set out in your Grant Notification letter. You must also address any issues we identify in the course of monitoring, and follow the requirements specified in the Programme Application guidance and any other material we refer to. All guidance is available on our website.

We may prepare a contract specifically adapted for your project if we feel that this is appropriate. In certain circumstances we may also choose to vary any of the procedures set out in this document.

This guidance applies to all Listed Places of Worship: Roof Repair Fund awards.

#### 1.1 Filling in online forms

You will need to fill in a number of forms online [via the portal](#) as part of our monitoring process. We will ask you to attach copies of documents (of less than 5Mb in total) to accompany each form. Please refer to the specific section in this document to find out what information we require. The forms are:

- Permission to Start and First Payment Request
- Progress Report
- Second Payment Request (known as the Advance Payment Request Form)
- Completion and Final Payment Request

#### 1.2 Seeking payment of your grant

We will pay your grant in three instalments:

- We will pay you 70% of the grant in advance as soon as we have agreed your Permission to Start.
- Once you have spent the first instalment of your grant, we will give you the next 20% of the grant.
- We will pay the final 10% when you have completed your project.

We will ask to see evidence that you have spent your grant.

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### 2 Permission to start and grant payment request

Within six months of the date on your Grant Notification Letter, you will need to obtain Permission to Start.

Before we are able to pay the first 70% of your grant you will need to complete the following tasks:

- Secure all partnership funding
- Obtain statutory permissions (for example faculty or listed buildings consent)
- Secure any necessary licences (for example a bat licence)
- Conduct any required surveys or investigations
- Ask you architect or building surveyor to draw up a specification of works

Once you have completed all of these tasks you can then submit your Permission to Start form online. You can access the form by logging into the [online portal](#).

To log in you will need to use the email address and password you created when you applied for your grant. If these details have changed since you made your application please contact [enquiries@lpowroof.org.uk](mailto:enquiries@lpowroof.org.uk). The Permission to Start form will be in the My Projects tab and listed under the “To Do” section.

The Permission to Start form is divided into the following sections:

#### 2.1 Approved purposes

We will monitor your project against the approved purposes described in the Grant Notification Letter. The approved purposes summarise what your project will do and what the grant will be spent on.

If the approved purposes are likely to change, you will need to seek our written permission by sending your grants officer details of your reasons for the change and showing us how it will affect:

- the cost of your project;
- the quality of your project; and
- the time you need to finish your project

Tell us about any changes or events which may prevent your project from achieving its predicted outcomes or affect its future viability. We may then re-assess the project, or take any other action we consider necessary. We may give permission for the change only if you agree to keep to extra terms and conditions.

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### 2.2 Agreed costs

It is important that you check that the costs listed in the Agreed Costs section of the Permission to Start form are correct. The breakdown will show the cost of each of the main elements of your project. It will also separate any amounts allowed for VAT and contingency.

The Listed Places of Worship Grant Scheme (LPW) will give you a grant for the actual amount you spend on VAT on eligible repairs and professional fees. We expect you to make a claim to this scheme. For more information [visit the website](#). We will only pay for VAT that you cannot reclaim through the LPW scheme, for example VAT on publicity costs.

We cannot authorise the transfer of any part of the project costs to or from the VAT budget outlined in the Grant Notification Letter.

### 2.3 Partnership funding

In this section of the form you will be able to confirm all of the partnership funding is secured and in place. The LPW Scheme can remain unsecured as this is reclaimed retrospectively.

### 2.4 Summary of changes

If you need to make any changes to the project timetable included within your application form, please use this section in your Permission to Start form to provide an explanation of the changes and why they are needed. If applicable, please also use this box to tell us about any changes to your project team since your grant was approved.

### 2.5 Statutory permissions and licenses

You should get statutory or ecclesiastical approvals or permissions that you need for your project before work starts. Please indicate which approvals or permissions are necessary and when you expect to receive them. There may be other licences involved which are not listed below but frequent examples include:

- planning permission;
- listed building consent;
- Faculty, or other denominational equivalent;
- scheduled monument consent;
- conservation area consent;
- building regulations;
- bat license;

However, we may agree a phased programme of works with you that allow you to start the project before all statutory approvals or permissions have been obtained. If we agree to this, you will need to update your grants officer as you receive approval for new permissions and licences.

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### 2.6 Bank account details

Please provide your account name, number and sort code as it appears on your bank statement.

You will also need to provide the names of at least two people who can sign documents on behalf of your place of worship. This section will need signing in the outlined boxes once the form has been submitted online and printed.

### 2.7 Payment request – first advance payment of 70%

This section of the form should already be filled out for you.

### 2.8 Declaration

You will need to nominate someone on behalf of your organisation to complete this section, they will also need to sign the declaration once the form has been submitted online and printed.

## Supporting documents

You will need to send the following documents to your grants officer to accompany your Permission to Start form:

- A copy of a recent bank statement or a paying in slip (see 2.9 for further information).
- Proof of partnership funding if applicable (for example a letter confirming a contribution from the funding body or a letter from your treasurer confirming the contribution from the church). Any unsecured partnership funding will need to be underwritten, and evidence of this provided. (We may, exceptionally, consider a realistic fundraising plan instead).
- Where appropriate, copies of deeds, leases, mortgages or proof of ownership if this has not previously been provided with your application. See Appendix B for more information.
- Proof of any necessary statutory or ecclesiastical permissions and licences (see section 2.5 for further information).
- Specification of works produced by your professional advisor.  
We expect to fund well-planned projects, led by a suitably qualified professional adviser (or team). We encourage the appointment of professionals with the following recognised accreditations:
  - Architects listed on the Register of Architects Accredited in Building Conservation (AABC) at category 'A' or the RIBA Conservation Register at Specialist Conservation Architect or Conservation Architect levels;
  - Chartered Architectural Technologists who have Conservation Accreditation from the Chartered Institute of Architectural Technologists; and
  - Chartered building surveyors listed on the RICS Building Conservation Accreditation Register.

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- A statement explaining how you will choose and manage your goods, works and services contracts. You do not need to have gone to tender before we grant Permission to Start but we do need to know how you will meet our procurement requirements (see section 3).

### **2.9 Bank account details**

We will pay your grant by bank transfer (BACS). We will not make payments into personal bank accounts and the grant can only be paid to the organisation named in the Grant Notification Letter. You may wish to set up a separate bank account for your project so that you can monitor the project's finances more easily.

We will need to see a copy of a recent bank statement (within the last three months), or a cheque or a paying-in slip for the relevant account, showing the bank account name, sort code and account number. You need to make sure when completing the Permission to Start Form that the bank account information you provide is identical to that listed on the bank statement, cheque or paying-in slip otherwise we cannot process your payment.

### **2.10 Submitting the form and approval of Permission to Start**

Once the Permission to Start form is submitted online, you will need to print a hard copy of the form, sign and date it, and then send it to your grants officer for NHMF approval.

We need at least two signatures from people nominated as signatories in the bank account section of the form and one signature on the final page of the form - the declaration. The person signing this declaration must have the authority to do so. By signing the declaration, you are confirming that your organisation understands and accepts the grant award along with the Standard Terms of Grant and all the associated requirements.

We cannot accept photocopied signatures – it must be original signatures.

Once we have approved your request we will return a copy of the form to you and will authorise the payment of the first 70% of your grant. You must get our approval in writing if you need to make changes to these documents.

You should not start the repairs to your place of worship until you have received our approval through Permission to Start. If you do start before receiving our approval, this will be at your own risk. We will not make any grant payments to you until this form has been approved.

We aim to release funds within 15 working days of receiving your request provided you have sent us the information that we ask for. Payment will be made to the account agreed with NHMF as set out within the 'Permission to Start and first payment request' form. We can only release funds against agreed costs that meet the approved purposes and will deliver the intended outcomes.

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### 3 Updating us on your progress

Once you have received permission to start you should update your grants officer on the progress of your project as described below and in section 5:

#### 3.1 Obtaining quotes for the works

You will need to provide your grants officer with proof of the competitive tender process in the following circumstances.

You must get at least three comparable and written competitive tenders or quotes for all goods, works and services worth £10,000 or more (excluding VAT) that we have agreed to fund. Once you have identified a preferred contractor you will need to provide evidence to your grants officer of the quotes you have received.

For all goods, works and services worth more than £50,000 (excluding VAT), you must provide proof of competitive tendering procedures in the format of a report on the tenders you have received, together with your decision on which to accept. You must give full reasons if you do not select the lowest tender.

If you intend to use any consultants, contractors, or suppliers who are linked – i.e. are close friends, relatives, ex-members of staff working at these consultants, contractors or suppliers – with any senior members of your organisation, or if there any financial link such as ownership of these suppliers you must obtain our written permission first.

You must meet the relevant UK, European Union (EU) and World Trade Organisation (WTO) regulations and legislation for buying goods, works and services. You need to check whether they apply to your project. If they do, you must tender openly for the goods and services in accordance with these regulations. You can find useful information and guidance on the Cabinet Office website.

#### 3.2 Cost breakdown and cash flow forecast

Once you have obtained quotations and identified your preferred contractor you will need to send your grants officer an updated breakdown of project expenditure.

We also require an updated cash flow forecast which shows the planned timing of your income (including any partnership funding) and expenses over the life of your project. You must show clearly the expected timing of grant payments. We will make the second payment of 20% of the grant once you have spent the first instalment of your grant. Please note we will retain the final 10% until the project is completed.

#### 3.3 Detailed timetable

We require a detailed timetable for the lifetime of your project. It should show a realistic timescale for achieving the Approved Purposes, including any additional conditions set out in the Grant Notification Letter. It should show clearly all the main activities, resources, milestones and targets necessary to complete the project on time.

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We will use the information you supply to help us monitor your project's progress and performance.

If you think that you will not be able to complete your project before the grant expiry date then please contact your case officer who will be able to discuss this with you.

### **4 Second payment request**

When you have invoices to demonstrate that you have spent the first 70% of the grant you must log into the online portal and submit a second payment request, the form will be listed under the "To Do" items and will be titled 'Advance Payment Request Form'.

It is important that you keep proper up-to-date accounts and records. You will be expected to attach all relevant copies of accounts, or invoices and contract administrator's interim payment certificates to the form via the online portal. Please note all files sent to us through the portal should be freely reusable by NHMF in accordance with your terms of grant. When saving digital copies of invoices to send to us, please keep the file size (MB) as small as possible, while still ensuring the image is clear.

The second payment will make up 20% of your total grant, after this payment has been processed we will not make any further payment until your project is finished and you submit a 'Completion report and final payment request form' (for further information see section 6).

Please note we cannot make a second payment of your grant until we have received proof of the quotes you have obtained during the tender process (for works, goods or services over £50,000 a written report is required) your project timetable and an updated cash flow forecast (see section 3.1, 3.2 & 3.3).

The form is divided into the following sections:

#### **4.1 Agreed and predicted final costs**

In this section of the form you will need to provide the costs you have incurred to date and your expected final costs.

#### **4.2 Spending on agreed costs that the previous payment covered**

It is important that you list each invoice in your Spending Summary as the figures included in this section of the form will impact the calculated total expenditure of your project so far.

You will need to provide details of the invoice including the cost heading it belongs to, the invoice reference, date, name of supplier and a description of services / goods. You will also need to input the total invoice cost (excluding VAT), VAT and the total cost you are claiming for that specific invoice. All costs provided will require you to include an invoice.

All proof of costs must be dated after the grant award date and before the grant expiry date shown in the Grant Notification Letter. If invoices include costs which are not part of the agreed

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costs, you will need to deduct the additional costs from the invoice when making your claim. We reserve the right to refuse payment of invoices which we consider do not form part of the original agreed project.

### **4.3 Payment request**

This section of the form will be filled out for you. It is important that you make sure the total expenditure listed is equal or more than the amount previously received. If this figure is less we cannot process your second payment.

Once you have completed this form you will need to submit a progress report (see section 5).

## **5 Progress report**

You must update us on the progress of your project when you request your second payment using the 'Progress Report' form which will be listed under the "To Do" items on the online portal.

You should tell us about your achievements and successes. We also want to know about any problems or issues that you face. If something significant occurs between scheduled progress reports which is likely to lead to changes in the costs, considerable delays, or a failure to deliver the approved purposes you agreed in the Permission to Start documentation you will need to let us know as soon as possible.

The form is divided into the following sections:

### **5.1 Approved purposes**

Provide a summary of your project's progress and identify any problems or issues we need to know about. List any actions you plan to take in response to these problems.

### **5.2 Project timetable**

Explain any significant delays to your project's delivery. You will also need to tell us how you will ensure that the project finishes by the grant expiry date. Your grants officer may agree changes to the timetable and will amend the dates accordingly.

### **5.3 Changes**

You must have the approval of your grants officer before making any changes to the approved purposes. If applicable, use this section to tell us about any changes that you have made which have been approved by your grants officer since your previous report.

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### **5.4 Statutory permissions**

Where necessary, provide evidence showing that you have received approval from the relevant authority. If you received all of the relevant statutory permissions at the start of your project this section will not be applicable to you.

### **5.5 Consultants, contractors and suppliers**

You will need to provide details of any appointments made which you have not already informed your grants officer about. Please see section 3.1 for more information about our procurement requirements.

### **5.6 Recruitment of staff**

You will be asked to confirm whether you have recruited or plan to recruit any staff.

### **5.7 Changes to agreed costs**

Complete this table if there are significant changes and you are wishing to seek agreement from your grants officer to change the approved purposes or consider revising the grant award or grant percentage.

### **5.8 Proposed cost transfers**

If applicable, complete this table to provide details of any amounts that you would like to transfer between cost headings. You will also need to provide information on how this change will affect the approved purposes.

Please include any requests for use of contingency (if applicable) in this table. You must get our permission for major spending of the contingency against any individual elements.

You cannot transfer any part of your grant award into or out of the VAT budget. This allowance is ring-fenced as you claim the VAT back from the LPW Grant Scheme (more information can be found at on the [LPW Grant Scheme website](#)).

### **5.9 Project records**

#### **Photographs**

It is useful if you provide photographs of the works that have taken place to date as an attachment to the Progress Report Form.

## **Funding Acknowledgement and Public Relations**

You must acknowledge your grant by placing notice of the award on any website or newsletter associated with your organisation. A Listed Places of Worship: Roof Repair Fund logo is

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available to download from [the LPOW website](#). You will have also been provided with a Certificate of Award which we require you to display on your noticeboard or similar while the project works take place.

## 6 Final Grant Payment

When you have completed all of the repairs to your place of worship, received all of the project invoices and your architect or surveyor has provided you with a Practical Completion Certificate you will need to claim your final grant payment of up to 10% by filling in the 'Completion Report and Final Payment Request' form. This form will be available on the online portal and listed under the "To Do" section. In addition to completing the form online you will need to provide the following documents:

- a completed evaluation report (please refer to our website to download the evaluation report)
- project records, for example, digital images
- a 10 year maintenance plan (please refer to our website to download the guidance notes and template)
- Practical Completion Certificate
- any invoices that have been received since your second payment request

Please note that we will not make your final payment until we have received all the additional information.

The form follows the same structure as the Progress Report (see section 5). You will be asked to complete a spending summary and include details of all of the invoices you have received since submitting your second payment request.

The final payment request will auto-populate from the information you provided in both the 'Advance payment request form' and the 'Completion Report and Final Payment Request'. The Final Payment request section of the form will include the grant percentage which was stated in your Grant Notification Letter. This is calculated based on the level of partnership funding contributed towards the project (including the LPW VAT Grant Scheme).

Therefore we will pay a proportion of the costs you have incurred based on your agreed costs.

### Worked example:

Total project costs are £48,000 (including VAT). Your organisation is contributing £5,000 from your reserves, VAT reclaimed through the LPW Grant Scheme makes up £8,000 of the total costs and your grant from the Listed Places of Worship: Roof Repair Fund is £35,000. The award percentage is therefore 73% (grant award divided by total project costs).

If your project comes in under budget we will adjust your final payment amount accordingly. For example if your total evidenced project cost is £46,000 (including VAT) then based on your grant

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percentage of 73% we will pay you a total grant of £33,580. Therefore your final payment will be adjusted to account for the underspend and would be £1,420 rather than £3,500.

Once you have made your final grant request, we will not accept any further requests for payments from you. You should therefore try to agree your final accounts with your contractors and suppliers before you apply for the final grant payment.

We may continue to keep in contact with you at intervals after the project is completed.

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### Appendix A: Additional definitions

**Approved purposes** – The purposes for which you have been offered a grant and how you plan to carry out those purposes as set out in your application and confirmed in our letter awarding you the grant as well as any additional information set out in the Permission to Start and subsequent correspondence.

**Approved costs** – The costs we have agreed to contribute towards as set out in your grant award notification.

**Payment percentage** – The proportion we pay against invoices. This is calculated by dividing the grant award by the agreed costs.

**Payment limit** – We will normally pay no more than 90% of your grant until we are satisfied that:

- the project is finished;
- you have met all our standard terms of grant and any additional grant conditions;
- we have received an acceptable final grant payment request and completion and evaluation report;
- Appropriate funding acknowledgement is in place.

**VAT** – Our grant percentage will include your VAT payments if these were included in the approved costs for your project.

You must do all that you can to:

- make your project VAT-efficient;
- make sure that VAT is applied only to relevant parts of your project; and
- claim back any VAT which you can.

If your VAT payment decreases during the project, we will reduce our contribution to those costs and you will have to pay back any amounts of VAT you have managed to claim back. If your VAT payments increase we will not increase our grant payment. You must not transfer any VAT savings that you have made to any other budget heading.

**Contingency allowances for unexpected expenses** – Only use this allowance where unforeseen circumstances have affected the costs of individual elements of the approved purposes. We will reduce your grant by the proportion of the contingency that you did not need to spend.

**Increases or decreases in the approved costs** – The costs of the project may increase or decrease. Where costs increase during the course of the project we will only consider increasing your grant in exceptional circumstances. In this case you will have to provide further information in writing to your grants officer.

If the final cost of your project is lower than the agreed cost, we will reduce your grant in line with the agreed overall grant percentage.

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### Appendix B: Property ownership

If you are successful with your Listed Places of Worship: Roof Repair Fund application, we expect you to own, or be the only organisation to use any property on which you spend the grant. If you do not meet our ownership requirements, we will need you to improve your rights for example, by changing or extending a lease.

#### Buildings

For projects involving buying or carrying out capital work to buildings, we expect you to own the freehold or have a lease of sufficient length for you to fulfil our standard terms of grant.

This means:

- If your organisation does not own the freehold, you will need a lease with 10 years left to run after the expected date of your project's completion (or 10 years if the lead applicant is a private individual or 'for-profit' commercial organisation).
- We do not accept leases with break clauses (these give one or more of the people or organisations involved the right to end the lease in certain circumstances).
- We do not accept leases with forfeiture on insolvency clauses (these give the landlord the right to end the lease if the tenant becomes insolvent).
- You must be able to sell on, sublet and mortgage your lease but if we award you a grant, you must first have our permission to do any of these.